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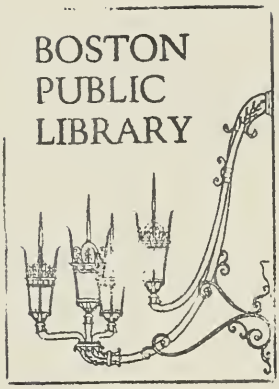
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MARKET FEASIBILITY OF A SPORTS MUSEUM IN DOWNTOWN BOSTON

Prepared for

NEW ENGLAND SPORTS MUSEUM

May, 1987

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Section I

INTRODUCTION

Economics Research Associates was retained by the New England Sports Museum to assess the attendance potential and probable distribution at a proposed new museum in one of two downtown locations: the Customs House tower and the Boston Garden area. Specifically, ERA was asked to review and refine the development concept, examine market area demographics, assess the experience of comparable facilities, review museums and other attractions in the area which might be competitive, analyze the two proposed sites, project attendance, and provide preliminary indicators of sizing for a new facility.

We have completed the tasks outlined above, and our findings and conclusions are presented in this report. Section II is a summary of the major findings. Section III discusses the concept and program at the proposed museum. The site attributes, market characteristics, and potentially competitive facilities are described in Section IV. The next section outlines the operating and attendance characteristics of other sports museums and halls of fame in the United States. The final section makes attendance projections by year, month, peak day and peak period, estimates the distribution between adults and children, and provides sizing parameters for development.

This report and investigation was conducted by Stephen L. Gerritson, Senior Associate, in ERA's Chicago office. Assistance was provided by Cecily P. Ahern, Associate.

Section II

EXECUTIVE SUMMARY

Introduction

This section provides an overview of the major findings, conclusions and recommendations of the study. For a complete discussion of each issue, the reader is referred to subsequent sections.

Concept

ERA has assumed a sports museum with three "levels" of involvement. The first would be introductory, intended for the casual visitor, making use of striking exhibits and displays. The second will provide in-depth exhibits, concentrating an individuals, teams, and education, and will feature interactive or participatory modules or exhibits. The third level will be more detailed, containing archival and research materials. Throughout the facility, the exhibits will strive for a blending of education and entertainment. ERA also recommends that a regular program of personal appearances by regional sports personalities be pursued.

Market Considerations

This analysis considers two locations: the Customs House tower and the Boston Garden area. The Customs House tower is considered

superior, due to its status as a Boston landmark, its proximity to Quincy Market and other area attractions, the character of the neighborhood, and adjoining uses.

The primary resident market has been defined as residents of Suffolk County. The secondary resident market is the remainder of the Boston SMSA. The tourist market is those visitors to Quincy Market from outside the Boston SMSA.

A number of facilities and attractions are currently operating in the vicinity of Quincy Market. These are: the Children's Museum, the New England Aquarium, the Computer Museum, the Boston Tea Party Ship, and the U.S.S. Constitution and Museum.

Boston is a strong market for museums. The proposed sports museum will have a large resident and tourist market to draw upon, and the success of other facilities in the area indicates that the sports museum will do well.

Comparable Facilities

A number of sports museums and halls of fame throughout the United States were surveyed. These were of three types: those focussing on a particular sport (such as the Baseball Hall of Fame); those focusing on a particular event (such as the Kentucky Derby Museum); and those focusing on a particular region (such as the San Diego Hall of Champions). Each has a different operating profile and market.

Attendance Projections

Using the information developed in our analysis, ERA has projected visitation at the Customs House tower site of 350,000-438,000 persons per year. Attendance at a site in the vicinity of the Boston Garden would be considerably lower, at 184,000-274,000 per year. July will be the busiest month, at 15% of annual attendance, and Saturday the busiest day, at 19% of weekly attendance. Peak day attendance (a Saturday in July) will be 2,400 persons. Peak on-site attendance will be 35% of this, or 840 persons.

Based on these distributions, an exhibit area of 29,400 square feet is required for displays, circulation, lobby and gift shop. The gift shop should be about 2,500 square feet.

Section III

CONCEPT DEVELOPMENT

Introduction

This section discusses the concept to be implemented at the proposed sports museum, and suggests potential themes and exhibit elements. An assessment of activities and special events is also provided.

Concept Overview

The proposed New England Sports Museum will be dedicated to commemorating the greatness and the history of New England sports, from professional teams to high schools to individuals. All sports and all time periods will be covered.

Conceptually and, if the building permits, physically, the museum will be organized into three levels. The first will be introductory, intended for the casual visitor, and will make use of the striking items and exciting exhibits, perhaps films from the "Havilcek Steals the Ball" playoff or the 1967 Red Sox series. The second level will be more in depth exhibits, and will concentrate on three areas: outstanding individuals, team achievements, and education. The third level will be more detailed, containing archival and research materials, historical records, and similar displays. In this manner all levels of interest may be accommodated.

Throughout the facility, there are two goals to strive for: first, to make the exhibits as educational as possible without sacrificing the entertainment quality; and second, to avoid the stereotypical sports museum displays of artifacts and wall posters. While there is a place in all fields, including sports, for the collection of artifacts, very few people are interested in those types of collections, and a sports museum which focuses on such elements will attract very few visitors.

The goal of using the medium of sport for education purposes is a good one, and one that is achievable. Many fields, from biology and physics to mathematics and chemistry, have direct applications in every sport. Other fields, such as history and social studies, are indirectly or contextually related. The desire to go beyond the sport and to educate as well as entertain will provide an important community service, and may attract more visitors.

Concept Discussion

As noted above, the museum will be divided into three levels. The first level will contain the lobby, the ticket area, a foyer with a "hall of flags" displaying championship pennants won through the years by New England teams, and a series of exciting exhibits and displays of interest to the general public. There will also be a gift shop. We suggest that an area be designed for personal appearance by sports personalities as well.

The second level will house the major exhibit areas of the museum. As noted, we see these as falling into three categories: great teams, the achievements of individuals, and education using

sports principles. These need not be mutually exclusive, and should be as intertwined as possible.

The third level will contain archives and artifacts, historical materials and reference files. Although this area can be open to the public, we feel that it will not have general appeal, and will be used by researchers and the most ardent fans.

Potential Exhibits

Although a detailed exhibit plan is beyond the scope of this assignment, several examples are suggested here to provide a sense of the experience which the visitor will have. Those entering the first floor area will be provided an overview of the greatness of New England teams and of the excitement of sports. We recommend that these exhibits involve the visitor as much as possible, through the use of interactive video, computer terminals, or other means. For example, to test reaction time as well as to encapsulate the great Bruins defenseman, Bobby Orr, the visitor could "play goalie" and try to stop one of Orr's shots, using video disk and a computer console, similar to a video game but much more realistic. Other possibilities are "sports trivia" quizzes, with varied levels of difficulty, and certificates or prizes (such as a coupon good for a return visit at a reduced rate) for achievement of a good score. The general interest and participatory nature of these exhibits is very important.

The second level will contain the majority of the exhibits. As noted, we feel that these should mix education and New England sports history insofar as possible. Again, we feel that interaction is very important. Some possible examples:

- "You be the Quarterback:" an opportunity to call plays for the Patriots or a New England college team in which the outcome is already known.

- "Test Your Reaction Time:" can use almost any sport as a means of understanding how the senses relay messages to the brain and cause muscles to respond.

- "Tests of Skill:" might require users to give numbers corresponding to height, distance, angle and force for a basketball shot, a pass, a pitch, etc.

- "Make the Call:" can set up certain situations, then ask for a ruling from the visitor as referee or umpire, to teach the rules of the game.

In addition to a set of skills and a knowledge of rules, every sport has an inherent set of values, such as teamwork, self-discipline, and honesty (as an acceptance of and abidance by the rules). These are important in many other applications and could also be built in to the exhibit program.

The third level, the archival and research area, can be organized by sport more as a library. A detailed discussion of this area is unnecessary.

The issue of personal appearances is also important. The museum should be an integral part of the New England sports scene by giving awards for significant achievement, by recognizing excellence, and by establishing itself as a forum for the discussion of issues. Personal

appearances by championship teams will both provide recognition to those deserving of it and increase the museum's credibility and name recognition.

Conclusion

The New England Sports Museum, as proposed, will appeal to the general public, the more involved enthusiast, and the professional researcher and most ardent aficionado. The important elements are a blend of sports history and education and interactive exhibitry. Equally important is the avoidance of displaying trophies and artifacts in endless cases. The museum must be alive and exciting in order to generate high levels of visitation.

Section IV

MARKET CONSIDERATIONS

Introduction

This section discusses the markets available to the proposed New England Sports Museum: residents, tourists and school groups. It assesses the performance of existing museums in the Boston market. First, however, it begins with a discussion of location and its impact on attendance.

Location

This analysis considers two new locations: the Customs House tower and the Boston Garden area. A third location, Christian Herter Park, the site of the current building, has not been considered due to size limitations.

The Customs House tower is one of Boston's most famous landmarks. Located just one block from Quincy Market and two blocks from the Old State House and Washington Street, the tower was Boston's tallest building from its construction in the early 1900's until the construction of the Prudential tower in the 1960's. It is also located in close proximity to many of the downtown's more popular night spots. Finally, the New England Aquarium and the Boston Children's Museum, two of the City's most important cultural and educational attractions, are located nearby.

Although only on the periphery of the development generated by Quincy Market, the Customs House tower and the immediately surrounding area have never been considered run-down or decaying. Flanked on one side by Quincy Market, on the other by the edge of the Financial District, the neighborhood has always enjoyed a positive image.

The area surrounding the Boston Garden has only very recently come into the public eye as an improving area. Part of this poor image is due to the nature of the Boston Garden itself. One of the older facilities of its type in the country, the Garden is long overdue for a major overhaul and improvement. Indeed, one of the items on the agenda of many city and state politicians for at least ten years has been a new arena to replace the Garden. Given the reluctance of the public sector to finance such a development, it is unlikely that one will occur. The area immediately around the Garden reflects this decay, augmented by the elevated tracks for the MBTA. Bars, fast-food restaurants and an x-rated cinema line the street across from the Garden entrance.

Recent developments, chiefly the demolition of the Madison Hotel and the development of the Thomas P. O'Neill federal office building, have improved the area somewhat, although many of the problems still remain. The area between the Garden and the beginning of the North End is characterized by large warehouses and the Stop and Shop wholesale bakery.

It is our feeling that the Customs House tower would be highly suitable for the New England Sports Museum. It is well known and recognized, which would afford a great deal of publicity and provide visibility from the Expressway. Its proximity to Quincy Market, the Aquarium and the Washington Street shopping complex would encourage

pedestrian traffic to make impromptu visits. It is estimated that 12-16 million persons visit Quincy Market each year. While many of these are office workers on their lunch hour or evening visitors, at least 4-5 million are tourists or suburban residents bringing friends to see this well-known development. Each of these would be potentially available to the museum.

The Boston Garden area, by contrast, does not generate much foot traffic. It is a little too far from Quincy Market for people to walk, especially those who are new to the city. While the Garden itself draws about 1.5 million per year, most of these are attending Celtics or Bruins games, generally in the evening. Nor are there other attractions in the general vicinity. The nearest one, the Museum of Science, is very difficult to get to by foot.

Access to both sites would be difficult, given the complexities of driving in Boston. Both sites are right off the Expressway, and parking is an equal problem in both areas.

Market Considerations

There are several elements to the available market for the New England Sports Museum: the primary resident market, defined as residents of Suffolk County; the secondary market, defined as the remaining residents of the Boston metropolitan area; and the tourist market, defined as visitors to the City for vacations, conventions, and visits to friends and relatives. A subset of the first two markets is the school group, an important component of visitation at any museum.

The population of the City of Boston and Suffolk County over the past decade has decreased by nearly 100,000 persons, or by 12.8% in a ten-year period. There are many factors which account for this, such as decreases in household size, poor economic conditions through 1981, and very high land and real estate values, which have encouraged sales and moveouts. At the same time there has been a shift from White ethnic populations to Blacks, Hispanics and, more recently, Southeast Asians. The population of Suffolk County is projected to decline further, to 612,300, by 1990.

The Boston Metropolitan Area is defined as ranging from Lowell and Lawrence on the North Shore to Brockton on the South Shore, and west to Framingham, Natick and most of Middlesex County. Although not large in terms of area, this region contains nearly 4 million persons. The SMSA has lost population over the past ten years as well, declining from 3.9 million in 1975 to 3.678 in 1985. This trend is projected to reverse, however, as improvements in the regional economy account for an increase in population to 3.697 million by 1990. Suffolk County and Boston SMSA population trends are shown in Table IV-1.

According to U.S. Census figures, approximately 8% of the SMSA population, or 294,000, is between the ages of five and fourteen, and makes up the primary school population (excluding high school). It is this population segment that will constitute the school group visitors.

The number of tourists visiting an area is more difficult to determine. It is known from sampling techniques and visitor surveys that approximately 16 million persons make use of some element of Quincy Market each year. Of that total, approximately 30%, or 4.8 million, are from out of the SMSA and therefore qualify as tourists.

The remainder are downtown office workers and employees (40%) and SMSA residents (30%). Because of the proximity of Quincy Market and the fact that it has become one of Boston's major attractions, this number of 4.8 million seems reasonable.

For the most part, visitors to Boston and New England are drawn by regional history and outdoor activities. The presence of such historical sites as the Freedom Trail, the U.S.S. Constitution, the John F. Kennedy Library and Museum, Plimoth Plantation, and others attracts visitors form throughout the world. Fall foliage tours, New England beaches, and special events such as the Boston Marathon, the Fourth of July celebrations, and others are also national attractions. Many of Boston's museums benefit from this high level of tourism. The Museum of Science draws regularly from New Hampshire, Rhode Island and even New York State, as well as Massachusetts. Their annual attendance of over a million persons consists of about 60% SMSA residents, 40% tourists. About 85,000 persons visit the museum each year in school groups.

Local Attractions

While the Museum of Science is the region's premiere facility of its type, there are a number of museums in the immediate vicinity of Quincy Market which can provide some insight as to the performance of the proposed sports museum. These are discussed below.

The Boston Children's Museum, located across the Fort Point Channel on Museum Wharf, is also a well-known Boston landmark, identified by the large milk bottle outside the entrance. The Children's Museum occupies three floors of the Museum Wharf building,

which it shares with the Computer Museum. The facility has an annual attendance of approximately 300,000 persons, nearly one-third of whom arrive in school groups. Admission fees are $4.50 for adults, $3.50 for children and seniors.

The Computer Museum, also at Museum Wharf, is less well known than the Children's Museum. Founded in 1983, it displays first-generation computers and the history of the computer industry, and offers the opportunity for research as well as casual viewing. Admission is $4.00 for adults, $3.00 for children and seniors. The museum gets approximately 100,000 visitors per year.

The New England Aquarium, located east of Quincy Market on Central Wharf, is a major tourist attraction in its own right. It enjoys a reputation as one of the better aquariums on the East Coast, and attracts approximately 900,000 visitors per year, about 45% of whom are tourists. The Aquarium charges $5.50 for adults, $3.25 for children and seniors.

The Boston Tea Party Ship and Museum is a commercial venture rather than a non-profit organization. Located on the Congress Street Bridge, it consists of a replica of the Merchant Ship "Beaver," one of the vessels from which the chests of tea were thrown during the Boston Tea Party. There is also a small museum and gift shop. Length of stay is about 45 minutes. Annual attendance is approximately 70,000 persons.

The U.S.S. Constitution, better known as "Old Ironsides," is on permanent display at the Charleston Navy Yard, and is part of the Freedom Trail. Approximately 600,000 persons visit the ship each year, many of whom are tourists. There is no admission fee. There is also a

small museum operated by a private non-profit organization, which displays naval history artifacts and other memorabilia. Admission is $2.00 for adults, $1.00 for children. This museum averages 80,000 visitors per year.

Conclusions

Boston is a strong market area for museums. With over 600,000 residents of Suffolk County and 3.7 million residents of the metropolitan area, the proposed sports museum will have a huge population to support it. Tourism is also strong and is more oriented toward museum attendance than in other cities. Large fluctuations in museum attendance indicate that more than mere numbers are required for success, however. The content of the facility is very important.

Table IV-1

COUNTY AND SMSA POPULATION
1975-1990

Year	Suffolk County	SMSA
1975	724,600	3,930,400
1980	701,200	3,914,600
1985	631,700	3,678,400
1990 (proj.)	612,300	3,697,100

Source: Sales and Marketing Management; and
Economics Research Associates.

Table IV-2

OPERATING CHARACTERISTICS OF
SELECTED BOSTON MUSEUMS

Facility	Hours	Admission Fee	Average Annual Attendance
Children's Museum Museum Wharf	Sat.-Thurs. 10-5 Fri. 10-9	Adults 3.50 Children 3.50	300,000
Computer Museum Museum Wharf	Sat.-Thurs. 10-6 Fri. 10-9	Adults 4.00 Children 3.00	100,000
New England Aquarium Central Wharf	Mon.-Thurs. 9-5 Fri. 9-9 Sat.-Sun. 9-6	Adults 5.50 Children 3.25	900,000
Boston Tea Party Ship Congress Street	Daily 9-7	Adults 3.25 Children 2.25	70,000
U.S.S. Constitution Charlestown Navy Yard	Daily 9-4	Free	600,000
Constitution Museum Charlestown Navy Yard	Daily 9-5	Adults 2.00 Children 1.00	80,000

Source: American Association of Museums, facilities listed; and
Economics Research Associates.

Section V

COMPARABLE FACILITIES

Introduction

This section discusses the experiences of selected sports museums and halls of fame. Attendance trends, hours of operation, and pricing are examined, as well as breakdowns of overall attendance by category. Finally, similarities to and differences from the New England Sports Museum are noted.

Comparable Facilities

A number of facilities were examined in detail for both quantitative information, such as hours of operation, admission fees, and attendance, and also for more subjective characteristics such as factors influencing success or failure. Operating characteristics of the facilities reviewed are summarized in the tables accompanying the text.

College Football Hall of Fame

The College Football Hall of Fame is located in King's Island, Ohio, adjacent to the King's Island Theme Park. It consists of about 33,000 square feet of exhibit space, a 230-seat auditorium theatre, three separate smaller theatres and a 70-seat 1930's soda shop. Exhibits include wall plaques, computer terminals to test trivia

knowledge and strategy skills, and the "Walk of Fame," an outdoor path with the names of High School championship teams set in brick.

Hours of operation from Memorial Day through Labor Day are from 9:00 a.m. to 6:00 p.m. daily. From January through Memorial Day, the facility is open on weekends only, from 10:00 a.m. to 5:00 p.m. Admission is $3.50 for adults, $2.25 for children. Annual attendance is approximately 30,000 persons. The busiest months are July and August, and length of stay is about two and a half hours.

The College Football Hall of Fame also has a playing field, used each year for a benefit game. The field may be rented by teams for special events.

Although 2.9 million persons attend King's Island every year, very few are interested in visiting the College Football Hall of Fame. The length of stay at a major theme park such as King's Island may be as long as eight hours or more, and the visit for a family of four is very expensive. The incentive to add a visit to the College Football Hall of Fame is slight, and the facility is located far enough away from other activities so that a destination visit is unlikely. The reason for the poor attendance is poor location.

Colorado Ski Museum

The Colorado Ski Museum and Ski Hall of Fame is located in Vail, Colorado. The museum has 12,000 square feet of exhibit space, a small library, and a 40-seat theatre. Exhibits show the history of skiing in Colorado by displaying artifacts, photographs, ski equipment and clothing. Exhibits are also maintained on specific ski areas of the state.

The museum is open from November 23 through mid-April, and from Memorial Day through mid-October. Hours of operation are 12:00-5:00 p.m., Tuesday through Sunday. The facility is closed Mondays. There is no admission fee.

Visitation at the museum in 1984 totaled 17,310, dropping to 15,665 in 1985 and 13,430 in 1986. Approximately 90% of total attendance is adults, 10% children; 10% are residents and 90% tourists. The museum has about 200 members. The length of stay at the museum averages around one hour.

This facility also suffers from poor location. Situated in the heart of Colorado ski country, it attempts to attract persons who visit the state expressly to ski, not to visit museums.

Green Bay Packers Hall of Fame

The Green Bay Packers Hall of Fame is located in Green Bay, Wisconsin, adjacent to Lambeau Field, home of the Packers. It consists of three levels of displays totalling 17,000 square feet of exhibit space, as well as a 150-seat theatre. Special events at the museum include after hours parties such as Super Bowl and tail gate parties. There is also an annual induction ceremony, honoring Packer greats such as Vince Lombardi and Bart Starr.

Hours of operation are from 10:00 a.m. to 5:00 p.m. daily. Admission to the museum is $4.00 for adults, $3.00 for seniors and $2.00 for children.

Attendance at the museum in 1984 was 49,746. It dropped slightly to 48,605 in 1985 and rose to 53,253 in 1986. There is a strong seasonal distribution, and during the peak months of June through September visitation is around 300 per day. About 80% of total visitors are tourists, while 20% are area residents. Adults comprise 60% of total attendance while 40% are children.

In spite of the small size of the market, the Green Bay Packers Hall of Fame draws a respectable annual attendance. There are many Packers fans in the Midwest, many of whom are willing to make a stop at the facility while in the area. This attendance is limited by the museum's focus on only one team.

Indianapolis Motor Speedway Hall of Fame

The Indianapolis Motor Speedway Hall of Fame is located in Indianapolis, Indiana, at the famed race track, home of the "Indy 500." It consists of approximately 50,000 square feet of exhibit space, and displays more than 25 Indianapolis "500" winning cars. The hall of fame also conducts track tours for an additional charge when the track is not being used for competition or test purposes. The Speedway also operates its own motel, dining room and golf course, adjacent to the race track.

Hours of operation at the hall of fame are 9:00 a.m. to 5:00 p.m. daily. Admission fees are $1.00 for adults. Children under 16 are admitted free. The track tour is an additional $1.00.

Historically, attendance at the hall of fame has averaged about 500,000 annually. The summer months are the busiest season. Tourists account for 85% of overall attendance, residents 15%. About 60% of the

visitors are adults, 40% children. The museum has no membership program.

In contrast to a number of other facilities, this one benefits enormously from its location at the Speedway. Many persons who come to see the race also visit the museum, as do travelers who stop to see the "brickyard." The interests of the travelers and the displays and exhibits of the museum coincide very well, and the facility is quite successful.

International Swimming Hall of Fame

The International Swimming Hall of Fame is located on a peninsula north of Bahia Mar in Ft. Lauderdale, Florida. It consists of about 12,000 square feet of exhibit space, a 50 meter pool and diving well. Admission includes use of the pool and well.

Operating hours are 10:00 a.m. to 5:00 p.m. Monday through Saturday, 11:00 a.m. to 4:00 p.m. Sunday. Admission is $1.25 for adults, $1.00 for students, seniors or military personnel and is free for children under six.

Attendance averages around 40,000 annually. About 40% of total visitors are residents, 60% tourists. Adults account for 60%, children 40%.

The hall of fame sponsors international diving meets, periodic water cruises, annual college swim coaches' forum as well as national and regional diving meets. The hall of fame is currently seeking to expand by adding a second floor.

Again, the low attendance at this facility seems to be due to a misunderstanding of the market. Competitive swimming is a relatively obscure sport, and is not done professionally. The facility competes with the many major attractions in south and central Florida, as well as the beaches, the Everglades, and other natural amenities. It is likely that the majority of attendance at this museum consists of persons who once competed themselves.

International Tennis Hall of Fame

The International Hall of Fame is located in Newport, Rhode Island. It is housed in an 1880 Newport casino, located on the site of the first national men's grass tennis championships, held in 1881. It is on a six acre site consisting of three indoor tennis courts and fifteen outdoor grass courts. The museum has 11,000 square feet of exhibit space. There is also a 410-seat Victorian theatre.

Operating hours from October through May are 11:00 a.m. to 4:00 p.m. daily. During the summer season, the facility operates from 10:00 a.m. to 5:00 p.m. The self-guided tour through the museum takes from thirty minutes to an hour. Admission is $4.00 for adults, $2.00 for children 6-18.

The hall of fame relies heavily on the tourist market, and summer vacationers in particular for attendance. Residents account for only 5% of total attendance, tourists 95%. Average attendance is 65,000 persons per year.

This facility has a good location in the wealthier area of Newport. Much of its attendance is derived from the curious, who drive through the town to see the huge summer homes of the very rich.

Tourism levels are not high enough to generate a larger volume of attendance, however. This facility is an example of a sports museum tied to a particular location by history. It would probably achieve higher visitation levels elsewhere.

Kentucky Derby Museum

The Kentucky Derby Museum is located on the grounds of Churchill Downs in Louisville, Kentucky. It consists of a single building with the first floor containing a 360 degree multi-image program and hands-on exhibits, as well as a changing exhibit gallery and a 100-seat theatre. The second floor is devoted to the thoroughbred industry and horse farms.

Operating hours are 9:00 a.m. to 5:00 p.m. daily. Admission is $3.00 for adults, $2.50 for seniors, and $1.50 for children aged five to fifteen. Children under five are admitted free.

Attendance at the museum averages around 150,000 per year. About 65% are tourists, 35% residents. Adults account for 70%, children 30% of total attendance. The museum does not have a membership program.

This facility is relatively new, and is experimenting with certain types of activities to increase visitation. For example, visitors may also take a guided tour of the famed Churchill Downs, and, if one is available, may meet a thoroughbred race horse. As is the case with the Indianapolis facility, the Kentucky Derby Museum has matched museum content with available markets very well. Attendance at this facility will increase as its operators become more experienced.

The Kentucky Derby Museum sponsors summer programs on care of thoroughbreds for children. The museum also conducts craft shows, fashion shows and an annual Derby Ball.

Little League Baseball Museum

The Little League Baseball Museum is located in Williamsport, Pennsylvania. It consists of approximately 23,000 square feet of exhibit space, indoor batting and pitching cages with video replay monitors and a stand-up two-person theatre.

Hours of operation from Memorial Day through Labor Day are 10:00 a.m. to 8:00 p.m. Monday through Saturday, and 1:00 p.m. to 5:00 p.m. on Sunday. At other times of the year the facility is open from 10:00 a.m. to 5:00 p.m. Admission is $3.00 for adults, $1.50 for seniors, and $1.00 for children.

Attendance at the museum averages about 29,000 a year. The strongest month is August, averaging about 10,000. Adults account for 60% of total attendance, children 40%. The museum does not have a membership program.

Again, this museum presents a relatively obscure subject in a relatively remote location. This is a problem which the organization can probably never overcome.

National Baseball Hall of Fame

The National Baseball Hall of Fame is located in Cooperstown, New York. It consists of a 150-seat auditorium and an audio and visual display theatre, in addition to the galleries and exhibits.

Operating hours from May through October are 9:00 a.m. to 9:00 p.m. daily. From November through April, hours are from 9:00 a.m. to 5:00 p.m. Admission is $5.00 for adults, $2.00 for children 7-15. Children under seven are admitted free.

Attendance at the museum in 1984 was 205,380. It increased to 222,120 in 1985 and rose again to 251,870 in 1986. The hall of fame depends heavily on the tourist market. Tourist account for 95% of total attendance, 5% residents. About 72% of those who attend are adults, 28% children.

The Baseball Hall of Fame at Cooperstown has been a national "shrine" for baseball fans throughout the country. In many respects it is a destination attraction, holding far more mystique than any of the others. In a major urban location, the Baseball Hall of Fame could attract many more visitors.

National Bowling Hall of Fame

The National Bowling Hall of Fame is located in downtown St. Louis, Missouri, just a few blocks from the Gateway Arch. Facilities include 50,000 square feet of exhibit space located on three levels in one building. The hall of fame also has four old time alleys and four new alleys for visitors' use, and a car in the shape of a bowling pin.

Hours of operation from Memorial Day through Labor Day are 9:00 a.m. to 7:00 p.m. daily, Labor Day through Memorial Day 9:00 a.m. to 5:00 p.m. Monday through Saturday, noon to 5:00 p.m. Sunday. Admission fees are $3.00 for adults, $2.00 for seniors, and $1.50 for children 5 to 12.

Attendance has averaged about 28,500 for the past three years. Residents of the St. Louis area comprise about 70%, tourists 30% of total attendance. About 80% of the hall of fame visitors are adults, 20% children. The hall of fame has about 1,500 members.

The low attendance at this facility may be explained by its subject matter. Its location, adjacent to Busch Stadium and midway between the Arch and Union Station, is in the heart of the tourist district, yet very few tourists visit the museum. This shows the dangers of being overspecialized.

National Football Museum, Inc.

The National Football Museum is located in Canton, Ohio. It consist of about 51,000 square feet of exhibit space, a 350-seat theatre, television monitors, taped voice recordings, question and answer panels and selective slide machines all within a four-building complex.

Hours of operation from Memorial Day through Labor Day are 9:00 a.m. to 8:00 p.m. daily. From Labor Day through Memorial Day the museum is open from 9:00 a.m. to 5:00 p.m. daily. Admission is $4.00 for adults, $2.00 for seniors, and $1.50 for children 5 to 13. A family admission is $10.00.

Visitation at the museum has averaged around 200,000 for the past three years. Approximately 95% of total attendance are visitors, 5% residents during the summer months. During the winter, tourists account for 60%, residents 40%. The museum does not have a membership program.

The National Football Hall of Fame approaches the Baseball Hall of Fame in popularity. It is becoming a destination attraction for the many thousands of professional football fans in the United States.

National Lacrosse Foundation and Hall of Fame

The National Lacrosse Foundation and Hall of Fame is located in Baltimore, Maryland. It consists of 2,000 square feet of exhibit space and an extensive film and video tape library which includes game action and instruction material.

Hours of operation are 1:00 p.m. to 4:00 p.m. Monday through Friday. Admission is free.

Attendance averages around 6,000 annually. Spring is the busiest season.

The National Lacrosse Foundation is involved in equipment purchase support programs, election of greats to the hall of fame, promotion of lacrosse, and helps in funding for the U.S. World Lacrosse Team.

It is really more of a service organization and a research facility than a museum.

National Museum of Racing

The National Museum of Racing is located in Saratoga Springs, New York and is situated across the street from the Saratoga Race

Track. The museum is one building with a 350-seat auditorium and 10 rooms dedicated to thoroughbred horse racing.

Hours of operation are 9:30 a.m. to 5:00 p.m. Monday through Friday. From May through November the museum is also open on Saturdays, from 12:00 to 5:00 p.m. There is no admission fee.

Visitation to the museum averages about 55,000 annually. The summer tourist season is their busiest time. The museum will be closed after Labor Day of 1987 for a $4 million renovation. It will reopen July 1, 1988.

The museum at Saratoga Springs is similar to the Kentucky Derby Museum, although tourism at Saratoga is not as high as in Louisville.

National Softball Hall of Fame

The National Softball Hall of Fame is located in Oklahoma City, Oklahoma. The hall of fame has 10,000 square feet of exhibit space, and a softball field.

Hours of operation for the Hall of Fame are from 8:00 a.m. to 5:00 p.m. Monday through Friday. The field facilities are open from 9:00 a.m. to 5:00 p.m. Tuesday through Friday, and 2:00 p.m. to 5:00 p.m. weekends. Admission is $1.00 for adults, $.50 for children.

Attendance at the museum in 1984 was 3,221 climbing to 5,674 in 1985 and dropping to 2,542 in 1986. Tourists comprise about 75% of total attendance, residents 25%. Only 20% of visitors are children, while 80% are adults.

This facility approximates the LaCrosse Hall of Fame, presenting an obscure topic. (Many people play softball, but it is hard to imagine visiting a museum dedicated to the game.)

Pro Rodeo Hall of Champions

The Pro Rodeo Hall of Champions is located in Colorado Springs, Colorado. The Hall of Champions is a two-level complex with 15,000 square feet of exhibit space. It has two electronic multi-media theatres, outside exhibit space, a garden housing rodeo animals, and a mini rodeo arena. It also has two 100-seat theatres.

Hours of operation from Memorial Day through Labor Day are 9:00 a.m. to 5:00 p.m. daily. From Labor Day through Memorial Day, the museum is open 9:00 a.m. to 4:30 p.m. Tuesday though Saturday, and noon to 4:30 p.m. on Sunday. Admission is $3.00 for adults, $1.25 for children.

Over the past three years visitation at the Pro Rodeo Hall of Champions has averaged about 73,000. Tourists comprise 85% of total attendance, residents 15%. Only 10% of visitors are children, while 90% are adults. Memorial Day through Labor Day is the strongest visitation season. The Pro Rodeo Hall of Champions currently has 2,000 members.

The Rodeo Hall of Fame captures a percentage of the visitors to the Rodeo Championships, held in Colorado Springs each year. In this sense it is also similar to the Kentucky Derby Museum.

San Diego Hall of Champions

The San Diego Hall of Champions is located in San Diego, California. It is housed in the Casa de Balboa in Balboa Park. It consists of a 38-seat theatre, 15,000 square feet of exhibit space, and several large 40 foot hydra-plane boats.

Hours of operation are from 10:00 a.m. to 4:30 p.m. Monday through Saturday and noon to 5:00 p.m. Sunday. Admission fees are $2.00 for adults, $1.00 for seniors, military personnel and students, and $.50 for children 6 to 18.

Attendance at the museum in 1985 was 180,000 and rose to 190,800 in 1986. The summer season is the museum's busiest time.

The museum sponsors seminars for high school students being recruited, and on sports medicine. The museum currently has about 500 members.

Located in a City park with seven other museums, this facility benefits from the nearby eight million persons who use the park each year. It also must compete with these other museums, however, and with the San Diego Zoo. Further, San Diego has acquired professional sports teams only recently, so there are few associations or identifying elements.

South Dakota Amateur Baseball Hall of Fame

The South Dakota Amateur Baseball Hall of Fame is located in Lake Norden, South Dakota. It consists of two buildings with 4,800 square feet of exhibit space.

Hours of operation are 9:00 a.m. to 7:00 p.m. daily, mid-May to mid-October. Attendance for the past three years has varied between 2,000 and 3,000. About 80% of total visitation is adults, 20% children. Residents of the area comprise 50% of attendance out-of-area visitors 50%.

This facility is strictly of local interest, an obscure topic in an isolated location.

Stock Car Hall of Fame

The Stock Car Hall of Fame is located in Darlington, South Carolina, next to the Darlington Race Track, the oldest paved circular track in the U.S. It consists of 9,000 square feet of exhibit space, and has ten old-time stock cars on display.

Hours of operation are from 9:00 a.m. to 5:00 p.m. daily. Admission is $2.00 for adults, children under 12 free.

Attendance has averaged 50,000 over the past three years. February through November, which is racing season, is the hall of fame's busiest season. Tourists comprise about 90% of total visitation, while residents make up 10%. Attendance is about 75% adult, 25% children.

Attendance at the museum is strongly related to the race schedule at the track. The average length of stay for the visitor at the hall of fame is 30 minutes.

This is another facility geared to a specific event or series of events. It is fairly successful, and penetrates its market fairly well.

World Golf Hall of Fame

The World Golf Hall of Fame is located in Pinehurst, North Carolina. Facilities include two buildings with a 100-seat theatre, hands on exhibits, displays of famous clubs, and one room devoted to the hall of fame honorees.

Hours of operation are 9:00 a.m. to 5:00 p.m. daily, from March through December. Admission fees are $3.00 for adults, and $2.00 for children 10-18. Children under ten are admitted free.

Attendance at the hall of fame has averaged about 40,000 persons per year. Attendance is about 80% tourists, 20% residents. Adults make up 90% of total visitation, children 10%. The hall of fame is busiest during golf season. The average length of stay is between one and two hours.

U.S. Hockey Hall of Fame

The U.S. Hockey Hall of Fame is located in Eveleth, Minnesota. It consists of one building with approximately 9,000 square feet of exhibit space.

Hours of operation from mid-June through Labor Day are 9:00 a.m. to 8:00 p.m. Monday through Saturday, 10:00 a.m. to 8:00 p.m. Sunday. During the winter months the museum is open from 9:00 a.m. to 5:00 p.m.

Monday through Saturday, noon to 5:00 p.m. Sunday. Admission to the hall of fame is $2.00 for adults, $1.00 children 6 to 12.

Attendance has averaged 17,000 per year for the past three years. The summer is the strongest visitation season, with tourists comprising 90% of total attendance, residents 10%.

Eveleth is a small town in northeastern Minnesota, and the museum's subject matter is not very popular.

Naismith Basketball Hall of Fame

The Naismith Basketball Hall of Fame is located in Springfield, Massachusetts, near the site of the YMCA where the game of basketball was invented. It consists of 28,700 square feet of exhibit space, a stand-up theatre which holds about 40 people, and a large theatre with fixed seating for 208. Established in 1968, the museum was recently expanded and reopened in 1985.

Hours of operation are from 9:00 a.m. to 5:00 p.m. daily. Admission is $6.00 for adults, $3.00 for children 8-15. Attendance in 1986 was 107,000.

The increasing popularity of basketball and the location in Springfield should contribute to higher attendance levels at this facility. Additional publicity to make people aware of its expansion should be undertaken.

Conclusions

As can be seen above, there are wide disparities among sports museums in the United States. Generally, they fall into three types: those dedicated to a particular sport or aspect of a sport; those dedicated to a particular event; and those dedicated to the sports and sports figures of a particular region. The first category has the most museums, modeled after the Baseball Hall of Fame in Cooperstown. Unless the sport itself is very popular, it is unlikely that the museum will be.

The second category is represented by the Indianapolis Motor Speedway Museum, the Kentucky Derby Museum, the Pro Rodeo Hall of Champions, and the Stock Car Hall of Fame. These are dependent upon event attendees for their visitation, and generally do rather well.

The third category, into which the New England Sports Museum would fall, is represented by the San Diego Hall of Champions, the Green Bay Packers Hall of Fame, and the several other facilities which do not keep attendance records. The San Diego Hall of Champions is the most successful. At least one museum in this category, the Texas Sports Hall of Fame, formerly located in Arlington, Texas, has ceased operations.

Factors which help to increase the chances for success are: a good location, a large tourist market without a specific destination attraction, and broad subject matter. The New England Sports Museum will have all three.

Table V-1

OPERATING CHARACTERISTICS OF SELECTED SPORTS MUSEUMS AND HALLS OF FAME

	College Football Hall of Fame	Colorado Ski Museum	Green Bay Packers Hall of Fame	Indianapolis Motor Speedway	International Swimming Hall of Fame
:ation	Kings Island, Ohio	Vail, Colorado	Green Bay, Wisconsin	Indianapolis, Indiana	Ft. Lauderdale, Florida
ıibit Area	33,000 sq. ft.	12,000 sq. ft.	17,000 sq. ft.	50,000 sq. ft.	12,000 sq. ft.
:ilities	230-seat auditorium, 3 small theatres, hands-on computer exhibit	40-seat theatre, ski films, and equipment and clothing encased	150-seat theatre, films, games, history of the Packers 1900 to the present	More than 25 "500" winning cars, and other race related cars; track tour	50-meter pool and diving well, olympic medals, films, photos
seum Established	1978	1976	1969	1956	1965
ırs of Operation	Mem. Day-Labor Day Daily 9:00-6:00 January-Mem. Day Weekends 10:00-5:00	Tuesday-Sunday 12:00-5:00	Daily 10:00-5:00	Daily 9:00-5:00	Monday-Saturday 10:00-5:00 Sunday 11:00-4:00
mission:					
Museum					
Adult	$3.50	Free	$4.00	$1.00	$1.25
Child	$2.25 (6-12)	Free	$2.00	Free (under 16)	$1.00 (under 16 free)
Family			$14.00		$3.00
Student					$1.00
Seniors	$2.50		$3.00		$1.00
Other Charges:				$1.00 (track tour)	use of pool included
mber of Members	0	200	0	0	n.a.

(continued)

Table V-1
(cont.d)
OPERATING CHARACTERISTICS OF SELECTED
SPORTS MUSEUMS AND HALLS OF FAME

	International Tennis Hall of Fame	Kentucky Derby Museum	Little League Baseball Museum	National Baseball Hall of Fame	National Bowling Hall of Fame
cation	Newport, Rhode Island	Louisville, Kentucky	Williamsport, Pennsylvania	Cooperstown, New York	St. Louis, Missouri
hibit Area	11,000 sq. ft.	n.a.	23,000 sq. ft.	n.a.	50,000 sq. ft.
cilities	Housed in an 1880 Newport Casino; a 410 foot Victorian theatre, 3 indoor tennis courts, 15 outdoor grass courts	Located on Churchill Downs; a 360 degree multi-image program, 100-seat theatre, hands-on exhibits	Indoor batting and pitching cages with replay monitors, films	150-seat auditorium, audio and visual display theatre	4 oldtime and 4 new alley, games and toys relating to bowling
seum Established	1954	1962	1982	1936	1970
urs of Operation	October-May Daily 11:00-4:00 June-September Daily 10:00-5:00	Daily 9:00-5:00	Mem.-Labor Day Monday-Saturday 10:00-8:00 Labor-Mem. Day Saturday 10:00-5:00 Sunday 1:00-5:00	May-October Daily 9:00-9:00 November-April Daily 9:00-5:00	Mem.-Labor Day Daily 9:00-7:00 Labor-Mem. Day Monday-Saturday 9:00-5:00 Sunday Noon-5:00
mission:					
Museum					
Adult	$4.00	$3.00	$3.00	$5.00	$3.00
Child	$2.00 (6-8)	$1.50 (5-15)	$1.00	$2.00 (7-15)	$2.00 (5-12)
Family			$8.00		
Student					
Seniors		$1.50	$1.50		
Other Charges	$25 per 1 1/2 hr. grass courts				
mber of Members	900	0	0	0	1,500

(Continued)

Table V-1
(cont.d)
OPERATING CHARACTERISTICS OF SELECTED
SPORTS MUSEUMS AND HALLS OF FAME

	National Football Museum, Inc. Canton, Ohio	National Lacrosse Foundation and Hall of Fame Baltimore, Maryland	National Museum of Racing Saratoga Springs, New York	National Softball Hall of Fame Oklahoma City, Oklahoma	Pro Rodeo Hall of Champions Colorado Springs, Colorado
:ation					
nibit Area	51,000 sq. ft.	2,000 sq. ft.	n.a.	10,000 sq. ft.	15,000 sq. ft.
cilities	350-seat theatre, actioo movie shown every 1 hour, 4 exhibit areas, a 52 foot football shaped domed building	Trophies, equipment, uniforms in displays	350-seat auditorium, 10 rooms of displays on thoroughbred horse racing	Shrines of the 94 hall of fame members	2 electronic multi-media theatres, outside exhibit space and garden housing rodeo animals. Mini rodeo arena, 2 100-seat theatres
seum Established	1963	1959	1950	1957	1979
urs of Operation	Mem.-Labor Day Daily 9:00-8:00 Labor-Mem. Day Daily 9:00-5:00	Monday-Friday 1:00-4:00	January-April Monday-Friday 10:00-4:00 May-November Monday-Friday 9:30-5:00 Saturday 12:00-5:00 June 15-September 15 Monday-Friday 9:30-5:00 Weekends 12:00-5:00	Monday-Friday 8:00-5:00 Field Facilities Tuesday-Friday 9:00-5:00 Weekends 2:00-5:00	Mem.-Labor Day Daily 9:00-5:00 Labor-Mem. Day Tuesday-Saturday 9:00-4:30 Sunday 12:00-4:30
imission:					
Museum					
Adult	$4.00	Free	Free	$1.00	$3.00
Child	$1.50 (5-13)	Free	Free	$.50	$1.25
Family	$10.00				
Seniors	$2.00				
Other Charges					
umber of Members	0	7,000	0	0	2,000

(Continued)

Table V-1
(cont.d)
OPERATING CHARACTERISTICS OF SELECTED
SPORTS MUSEUMS AND HALLS OF FAME

:ation	San Diego Hall of Champions San Diego, California	South Dakota Amateur Baseball Hall of Fame Lake Norden, South Dakota	Naismith Memorial Basketball Hall of Fame Springfield, Mass.	Stock Car Hall of Fame Darlington South Carloina	World Golf Hall of Fame Pinehurst, North Carolina	U.S. Hockey Hall of Fame Evelth, Minnesota
hibit Area	15,000 sq. ft.	4,800 sq. ft.	28,706 sq. ft.	9,000 sq. ft.	n.a.	9,000 sq. ft.
cilities	Housed in the Casa de Balboa in Balboa Park; exhibits relate to amateur and professional San Diego athletes	Picture history of amateur baseball in South Dakota	Two theatres; one is a stand-up theatre and has four screens and holds about 40 people. Also a converse theatre with a sloping floor that seats 208.	10 stock cars on display, hall of fame of stock car racers	100-seat theatre, shrines of inductees, hands-on exhibits	Contemporary exhibits on hockey, some audio-visual displays
seum Established	1961	1976	1968	1965	1974	1969
urs of Operation	Monday-Saturday 10:00-4:30 Sunday 12:00-5:00	Mid May-Mid Oct. Daily 9:00-7:00	Daily 9:00-5:00	Daily 9:00-5:00	March-December Daily 9:00-5:00	Mid June-Labor Day Monday-Saturday 9:00-8:00 Sunday 10:00-8:00 Winter Mon.-Satuday 9:00-5:00 Sunday 12:00-5:00
dmission						
Museum						
Adult	$2.00	Free	$5.00	$2.00	$3.00	$2.00
Child	$.50 (6-18)	Free	$3.00 (8-15)	Free (under 12)	$2.00 (10-18)	$1.00 (6-12)
Family						
Student						
Seniors	$1.00		$3.00			
Other Charges						
Number of Members	500	0	500	0	0	0

n.a. denotes information not available.

Source: Economics Research Associates.

Table V-2

ATTENDANCE CHARACTERISTICS OF SELECTED
SPORTS MUSEUMS AND HALLS OF FAME

	1984	1985	1986	% Adult	% Child	% Resident	% Tourist
Basketball Hall of Fame	n.a.	n.a.	107,836	70%	30%	n.a.	n.a.
College Football Hall of Fame	30,000 1/	n.a.	n.a.	n.a.	n.a.	25%	75%
Colorado Ski Museum	17,310	15,665	13,430	90%	10%	10%	90%
Green Bay Packers Hall of Fame	49,746	48,605	53,253	60%	40%	20%	80%
Indianapolis Motor Speedway	50,000 1/			60%	40%	15%	85%
International Swimming Hall of Fame	40,000 1/			60%	40%	40%	60%
International Tennis Hall of Fame	65,000 1/			90%	10%	5%	95%
Kentucky Derby Museum	150,000 1/			70%	30%	35%	65%
Little League Baseball Museum	29,000 1/			60%	40%	n.a.	n.a.
National Baseball Hall of Fame	205,380	222,120	251,870	72%	28%	5%	95%
National Bowling Hall of Fame	28,500 1/			80%	20%	70%	30%
National Football Museum, Inc.	200,000 1/			60%	40%	5%	95%
National Lacrosse Foundation and Hall of Fame	6,000 1/			n.a.	n.a.	n.a.	n.a.
National Museum of Racing	55,000 1/			n.a.	n.a.	n.a.	n.a.
National Softball Hall of Fame	3,221	5,674	2,542	80%	20%	25%	75%
Pro Rodeo Hall of Champions	73,000 1/			90%	10%	15%	85%
San Diego Hall of Champions	n.a.	180,000	190,800	40%	60%	5%	5%
South Dakota Amateur Baseball Hall of Fame	2,500 1/			80%	20%	50%	50%

(Continued)

Table V-2
(cont.d)
ATTENDANCE CHARACTERISTICS OF SELECTED
SPORTS MUSEUMS AND HALLS OF FAME

	1984	1985	1986	% Adult	% Child	% Resident	% Tourist
Stock Car Hall of Fame	50,000 1/			75%	25%	10%	90%
World Golf Hall of Fame	40,000 1/			90%	10%	20%	80%
U.S. Hockey Hall of Fame	17,000 1/			n.a.	n.a.	10%	90%

n.a. denotes information not available.

1/ Average for 1984, 1985 and 1986.

Source: Facilities Listed; and Economics Research Associates.

Section VI

ATTENDANCE PROJECTIONS

Introduction

This section analyzes the attendance potential of the New England Sports Museum at two locations: the Customs House Tower and the Boston Garden area. Total attendance, peak time attendance, and breakdowns by visitor category are also provided. Finally, size requirements for the museum and gift shop are provided.

Assumptions and Factors Affecting Attendance Potential

In assessing the market potential of the New England Sports Museum, ERA has used market penetration rates experienced by comparable museums, modified to reflect local conditions. The assumptions and conditions upon which these modifications were based are discussed below.

Assumptions

It has been assumed that the museum will be developed as discussed in Section III, as an interactive, entertaining and educational facility. Because the proposed museum will not have the "content recognition" enjoyed by institutions which have been in operation and are known by the public, it is assumed that the Sports Museum will be aggressively marketed. In particular, marketing programs should be aimed at school groups and Boston area visitors.

We have also assumed a relatively low admission fee, professional management by experienced museum operators, and personal appearances by professional or college athletes.

Finally, ERA has assumed that there will be no radical changes in national or regional economic trends, and that no similar attractions will be developed in the Boston area.

Factors Affecting Attendance Potential

In addition to the assumptions discussed above, there are several variables which can affect attendance. These are: the location and setting of the proposed facility, competitive facilities and activities in the area, density of the resident and tourist markets, and reinvestment in the facility. Each of these is discussed below.

Location: The two potential locations for the New England Sports Museum are the Customs House tower and the Boston Garden area. The assets and liabilities of each site are discussed in detail in Section IV. In general, the Customs House tower is a recognized landmark, in close proximity to Quincy Market, and in a pleasant and non-threatening part of the downtown. The area around Boston Garden is less attractive, presents no reason for pedestrian traffic, and may appear unsafe or intimidating to out-of-town visitors.

Access by car to both locations is equally difficult, given driving conditions in downtown Boston. Parking is available at both locations, although expensive. Access by public transportation at both sites is good.

Competitive Facilities: As discussed in Section IV, there are several existing facilities and attractions in the immediate vicinity. The major attraction, however, is Quincy Market, a specialty retail center with over 200,000 square feet of shops and restaurants. This complex attracts an estimated 12-16 million persons annually. The Aquarium and the Children's Museum are predominantly destination attractions, although the Aquarium benefits from its proximity to Quincy Market. None of the existing facilities is directly comparable to the Sports Museum, although each will compete for the visitor's time and money.

Market Density: In general, market penetration rates are inversely proportional to the size of the market being penetrated. The New England Sports Museum will achieve penetration rates similar to those achieved at the San Diego Hall of Champions, given the similarities of the markets and situations.

Reinvestment: Generally, after a period of three to four years, interest in any facility begins to wane, due to market saturation. This situation requires that a certain amount of reinvestment occur, in the form of new exhibits, special activities, or a regular program of personal appearances by popular figures. In this analysis we have assumed that this will occur at either location.

First-year Adjustments: Finally, facilities of this type generally experience higher attendance during their first year, due to curiosity and the "novelty" effect. Penetration rates for the first year have been adjusted to allow for their factor.

Attendance Projections

Based on the analysis of comparable facilities, and on the discussion of local characteristics and assumptions, typical penetration rates for similar sports museums have been adjusted to a arrive at the penetration rates likely for the New England Sports Museum at each location. This derivation is shown in Tables VI-1 and VI-2.

As shown, normal penetration rates for comparable visitor attractions in similar markets have been adjusted for three factors: location, competition, and market density. After adjustment, ERA projects penetration rates at the Customs House tower of 8-10% for the primary resident market, 5-6% for the secondary resident market, and 3-4% for the tourist market. Rates for the Boston Garden area are lower.

Tables VI-3 and VI-4 show attendance projections for the two sites for the first five years of operation. The first year has been adjusted upward by 10% to reflect initial market acceptance. As shown, the potential at the Customs House tower is significantly higher.

Seasonal Distribution

The comparable sports museums surveyed indicated overwhelmingly that summer was the busiest season. The museums in Boston also exhibit this trend. ERA has projected monthly attendance based on these distributions, as shown in Table VI-5. As is shown, July will be the busiest month, with 15% of total annual attendance. Assuming

approximately 375,000 persons per year, 56,250 will visit the museum in July.

Peak Day

Based on observed weekly distribution patterns at other Boston area facilities, Saturday will be the busiest day of the week, while Monday will be the slowest. Thus on a Saturday in July there will be approximately 2,400 visitors.

Peak Period

Not all of the peak day attendance will be in the facility at the same time. Because of the wide range of topics covered and the interactive nature of the exhibits, ERA projects an average length of stay of two to three hours. Assuming an operating day of ten hours during the summer, ERA projects that 35% of peak day attendance will be in the facility between the hours of 1:00 and 3:00 p.m. Thus peak in-house visitation will be 840 persons.

Facility Sizing

Given the peak load of 840 persons, and a requirement of about 35 square feet per person (which includes exhibits, circulation area, lobby and gift shop), the facility should be about 29,400 square feet. This assumes that offices, storage, and exhibit fabrication will be done off-site. At a desired return of $1.00 per capita in the gift

shop, and assuming an average return of $150 per square foot (an industry average), the gift shop should be about 2,500 square feet.

Attendance Distribution

Facilities surveyed throughout the United States averaged about 70% adults, 30% children in their attendance distributions. This seems to be consistent with observed visitation in most Boston area facilities, and will probably occur in the proposed New England Sports Museum.

Table VI-1

PENETRATION RATE ANALYSIS FOR
NEW ENGLAND SPORTS MUSEUM
CUSTOMS HOUSE SITE

Market Area	Normal Rate	Adjustment Factors 1/			Composite Adjustment	Projected Penetration Rate at Customs House
		Location 2/	Completion 3/	Density 4/		
Primary Resident	8-10%	105	-	90	95%	8-10%
Secondary Resident	4-5%	115	105	105	125%	5-6%
Tourist	2-3%	125	110	110	145%	3-4%

1/ Adjustment Factors are indices of variance, compared to 100 for similar market areas.
2/ Adjusted upward to allow for positive attributes of Customs House tower location.
3/ Adjusted upward to allow for "clustering" effects of other attractions.
4/ Adjusted downward in primary market due to low population; upward in secondary and tourist markets to allow for high density.

Source: Economics Research Associates.

Table VI-2

PENETRATION RATE ANALYSIS FOR
NEW ENGLAND SPORTS MUSEUM
BOSTON GARDEN AREA LOCATION

Market Area	Normal Rate	Adjustment Factors 1/			Composite Adjustment	Projected Penetration Rate at Customs House
		Location 2/	Completion 3/	Density 4/		
Primary Resident	8-10%	-	-	90	90%	7-9%
Secondary Resident	4-5%	90	90	105	85%	3-4%
Tourist	2-3%	75	90	90	55%	1-2%

1/ Adjustment Factors are indices of variance, compared to 100 for similar market areas.
2/ Adjusted downward to allow for negative attributes of area.
3/ Adjusted downard to allow for lack of other visitor attractions nearby.
4/ Adjusted to reflect relative densities of markets.

Source: Economics Research Associatea.

Table VI-3

ATTENDANCE PROJECTIONS
CUSTOM HOUSE TOWER

	Markets			
Year	Primary Residents	Secondary Residents	Tourists	Total 1/
1	49,000-61,000	154,000-185,000	144,000-192,000	382,000-438,000
2	49,000-61,000	154,000-185,000	144,000-192,000	348,000-438,000
3	45,000-55,000	154,000-185,000	144,000-192,000	344,000-432,000
4	43,000-52,000	154,000-185,000	144,000-192,000	342,000-429,000
5	41,000-50,000	154,000-185,000	144,000-192,000	340,000-427,000

1/ Low figure adjusted upward two percent in Year 1.

Source: Economics Research Associates.

Table VI-4

ATTENDANCE PROJECTIONS
BOSTON GARDEN AREA

Year	Markets			
	Primary Market	Secondary Market	Tourists	Total 1/
1	43,000-55,000	93,000-123,000	48,000-96,000	202,000-274,000
2	43,000-55,000	93,000-123,000	48,000-96,000	184,000-274,000
3	40,000-52,000	93,000-123,000	48,000-96,000	181,000-271,000
4	38,000-50,000	93,000-123,000	48,000-96,000	179,000-269,000
5	36,000-48,000	93,000-123,000	48,000-96,000	177,000-267,000

1/ Low figure adjusted upward ten percent in Year 1.

Source: Economics Research Assocates.

Tabel VI-5

PROJECTED ATTENDANCE DISTRIBUTION
AT
NEW ENGLAND SPORTS MUSEUM

Month	Percent of Total Attendance
January	3%
February	7%
March	6%
April	8%
May	11%
June	11%
July	15%
August	14%
September	8%
October	6%
November	5%
December	6%
	100%

Source: Economics Research Associates.

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AUTHOR

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